

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Czech Republic

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Grain and Rapeseed Crop Update

Report Categories:

Grain and Feed

SP1 - Expand International Marketing Opportunities

Oilseeds and Products

Agricultural Situation

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Report Highlights:

Grain and rapeseed harvests in Czech Republic are approaching the last quarter with yields and total production described as average or below average. Grain harvest (excluding corn) will be 13.2 percent lower compared to last year according to the Czech Statistical Office (CZSO). Rapeseed harvest in the current MY17/18 will decline by 11.8 percent. Yields dropped in all basic grains and rapeseed because of unfavorable weather conditions.

General Information:

MT = Metric Ton

HA = Hectares

MY = Marketing Year. Post and USDA official data both follow the EU28 local marketing year of July to June

Production

Czech Statistical Office estimates the average yield of grains (excluding corn) at 5.32 MT/HA and rapeseed yield at 4.64 MT/HA, while the Czech Ministry of Agriculture reports grain yield (excl. corn) at 5.63 MT/HA and rapeseed 2.97 MT/HA, based on harvest progress monitoring.

In the Czech Republic, grain harvest (excluding corn) will be 13.2 percent lower, when compared year-on-year, according to the latest estimates of the Czech Statistical Office (CZSO). Rapeseed harvest in the current MY17/18 will decline by 11.8 percent. The CZSO report noted that the grain production would end up below the 5-year and even the 10-year average (-6.5 percent and -4.2 percent respectively).

The major reason for the decreased production is lowered yield, as the total sowing area of MY17/18 is almost identical to the one in MY16/17. Yields dropped in all basic grains and rapeseed because of unfavorable weather conditions. Frost in January reduced winter crops, and in May and June the crops were negatively impacted by drought. If the drought continues corn yields will be significantly reduced as well. Corn production estimates will be published in October.

Overall grain and oilseed crop in the Czech Republic is generally described as average, the previous MY16/17 harvest was exceptional. The amount and quality of grains will be more than sufficient to cover the domestic demand.

Table 1 Czech Statistical Office July Crop Estimate

| | Sowing Area (000 HA) | | Production (000 MT) | | Yield (MT/HA) | |
|---------------|---------------------------|---------------------------|---------------------------|---------------------------|-------------------------|-------------------------|
| | CZSO Final Harvest Data*) | CZSO July 2017 Estimate*) | CZSO Final Harvest Data*) | CZSO July 2017 Estimate*) | CZSO Final Harvest Data | CZSO July 2017 Estimate |
| Year/ Crop | MY16/17 | MY17/18 | MY16/17 | MY17/18 | MY16/17 | MY17/18 |
| Wheat | 840 | 832 | 5,455 | 4,665 | 6.5 | 5.61 |
| - winter | 809 | 785 | 5,316 | 4,462 | 6.57 | 5.68 |
| - spring | 31 | 47 | 139 | 204 | 4.54 | 4.38 |
| Barley | 326 | 328 | 1,845 | 1,619 | 5.67 | 4.94 |
| - winter | 104 | 97 | 637 | 528 | 6.13 | 5.44 |
| - spring | 222 | 231 | 1,208 | 1,090 | 5.45 | 4.73 |
| Oats | 38 | 44 | 132 | 152 | 3.52 | 3.45 |
| Rye | 21 | 22 | 104 | 105 | 4.98 | 4.71 |
| Triticale | 40 | 36 | 193 | 168 | 4.88 | 4.64 |
| Rapeseed | 393 | 394 | 1,359 | 1,199 | 3.46 | 3.04 |

Source: Czech Statistical Office

*) Values were rounded by the FAS office.

The largest yield drops, as shown in Table 1, are in winter wheat (13.5 percent) and in winter barley (12.9 percent). Production will be lower for all grains except for oats, where increased area (+ 17.3) results in 15.1 percent higher production. The most dramatic production drop show winter barley and winter wheat by 16.1 percent (-109 thousand MT) and 17.1 percent respectively (-854 thousand MT). Rapeseed sowing area of 394 thousand HA is reported as the third largest since being monitored. The threshold of 400 thousand HA was exceeded only in 2012 and 2013, according to CZSO. Rapeseed production will decline in MY17/18 by 11.8 percent to 168 thousand MT.

Table 2 Czech Ministry of Agriculture Harvest Progress report to August 14

| | Area to be Harvested (000 HA) | Area and Percentage Harvested | Average Yield (MT/HA) | Production (000 MT) |
|-----------------------|-------------------------------|-------------------------------|-----------------------|---------------------|
| Year/ Crop | MY17/18 | | | |
| Wheat | 833 | | | |
| - winter | 786 | 82.9 | 5.88 | 3,829 |
| - spring | 47 | 63.2 | 4.55 | 134 |
| Barley | 328 | | | |
| - winter | 97 | 99.5 | 5.79 | 560 |
| - spring | 231 | 83.0 | 5.12 | 980 |
| Oats | 44 | 38.0 | 3.59 | 60 |
| Rye | 22 | 66.3 | 5.27 | 78 |
| Triticale | 36 | 56.0 | 5.05 | 103 |
| Rapeseed | 394 | 80.9 | 2.97 | 1,134 |

Source: Czech Ministry of Agriculture

According to the August 14 harvest progress report published by the Ministry of Agriculture, 80.9 percent of the grain area has been harvested with large percentage differences across regions. For more details see the Table 2 above. So far the yields seem more optimistic, when compared to the CZSO estimates. This does not apply to rapeseed, where the yield reported by the Ag Ministry is by 2.3 percent lower than the CZSO estimate and can be described as below average. The quality of grains is based on tests of the basic grain parameters and is described by the Ag Ministry report as good. In general, this year's harvest is not exceptional, however, will fully satisfy domestic demand and offer an exportable surplus as well.

Trade

Foreign trade in major crops is shown in the following tables. Patterns of trading partners do not significantly change, major export market markets for Czech grains and rapeseed remain Germany and Poland.

Table 3 Czech Republic's Wheat Exports

| Partner Country | (000 MT) | |
|-----------------|--------------|--------------|
| | MY15/16 | MY16/17 |
| World | 2,508 | 3,038 |
| Germany | 1,827 | 2,430 |
| Poland | 220 | 292 |
| Austria | 347 | 226 |
| Italy | 37 | 36 |
| Switzerland | 3 | 23 |

Source: Czech Statistical Office Foreign Trade Database

Table 4 Czech Republic's Barley Exports

| Partner Country | (000 MT) | |
|-----------------|------------|------------|
| | MY15/16 | MY16/17 |
| World | 506 | 527 |
| Germany | 307 | 315 |
| Poland | 64 | 95 |
| Slovakia | 30 | 48 |
| Austria | 71 | 45 |
| Italy | 30 | 12 |

Source: Czech Statistical Office Foreign Trade Database

Table 5 Czech Republic's Rapeseed Exports

| Partner Country | (000 MT) | |
|-----------------|------------|------------|
| | MY15/16 | MY16/17 |
| World | 306 | 394 |
| Germany | 235 | 259 |
| Poland | 42 | 118 |
| Slovakia | 19 | 12 |
| Austria | 9 | 4 |
| France | 0.1 | 0.1 |

Source: Czech Statistical Office Foreign Trade Database

For information on Czech grain and feed and oilseeds market, consumption and trade, please see also [Czech Republic Grain and Feed Annual](#) and Czech Republic [Oilseeds and Products Annual](#) report available in our GAIN system at <http://gain.fas.usda.gov>.

For more information on situation in the EU grain and feed and oilseeds market please refer to the [EU-28 Grain and Feed Annual](#) report and [EU-28 Oilseeds and Products Annual](#) report in our GAIN system available at <http://gain.fas.usda.gov>.